

511 Rideshare Program

Standard Operating Procedures



Employer Services Department

Version	Document Description	Date
1.0	Initial Draft	June 2006
1.1	Annual Update	July 2007
1.2	Annual Update	May 2008
1.3	Annual Update	May 2009
1.4	Annual Update	May 2010

Standard Operating Procedures Employer Services Department

Employer Services Activities

The employer services department consists of four employer service representatives and one part-time manager. Despite the recessionary challenges the state/country has faced this year, the demand from the employer market continued to experience growth. The following staff make up the Employer Services department:

- Linda Furnas – South Santa Clara County and Moffet Park
- Christy Garland – Marin, Sonoma and San Francisco Counties
- LaShawn Martin – Northern/Eastern Alameda County
- Miriam Sorell – North Santa Clara County

The Employer Services Representative job description is found as Attachment A.

There are five main functions of the Employer Services department:

- Employer Outreach Services
- Database Management
- Vendor and delegated county coordination
- Staff Management
- Contract deliverables

Employer Outreach Services

Employer Service Representatives time split varies based on employer demand. On average the monthly time split would be 60% in the field and 40% in the office. Field work can include; employer appointments, event staffing, attending other TDM group/committee meetings such as Air Resource Teams, SVLG, and T.A.M. Employer Service Representatives identify new employers by attending chamber meetings, territory canvassing, reading business journals, and getting referrals from existing employer clients. On average the ESR staff works with 50 employers per month, either via employer appointments, e-mails, or telephone calls.

The following services are explained during consultations at employer worksites or as part of a group meeting with several employers:

Commute Surveys	On-line Survey – these surveys provide information about attitudes and behavior of employees and their commute choices. This survey has an optional section for employees to complete to receive a commuter matchlist.
	CO2 – this new survey worksheet created from the standard survey report can be used by employers to show how much they can reduce emissions from greenhouse gases or carbon monoxide by implementing ridesharing and related programs.
Density Maps	From an employer provided excel file of

	employee addresses or employee zip codes, the RRP can provide a poster size map plotting where employees live to assist in determining best commute options
Trip Diary	Employees use this tool to track their commute modes monthly that allow employers to view a detail report of employee participation and emission reduction.
Web-based Ridematching	Employers can provide access to their employees via an assigned url address or link to the 511 ridematching system. Employers can be offered exclusive matching – matching with their employees only or regional matching – matching with within their worksite and surrounding business.
Online Event	Online Event – this is a virtual event that drives employees to complete a registration form to receive a matchlist. The online event registration runs for a designated time period and is then downloaded for data entry into the ridematching system.
Skinning	“Skinning” of the ridematch program is a means to give the employer a unique url link that runs RMS with the employer’s graphics and colors. This helps encourage employer co-sponsors 511 RMS. ESR’s are expected to hold quarterly meetings with clients utilizing skinned sites to ensure promotion of the RMS is taking place and employee registrations are increasing.
On-Site Employer Events	511 Rideshare staff will provide commute information to employees at health/employer benefits, transportation, environment, and job fairs.
Commuter Incentives	511 RRP Vanpool Start and Seat incentive and other county incentives are discussed with employers and employees.
Vanpool Formation	Discussion about the services of the vanpool department including; vanpool formation assistance, vanpool incentives, motor vehicle reports, medical reimbursements and vendor options.
Relocation Planning	Assistance is provided with the use of a density map to identify commute options for the new location and any appropriate county incentives.
Employer Referrals	Employer referrals work in three different

	ways. One is when the employer service representatives will ask the subject employer who may have multiple sites within the 511 service area to refer us to them. Two is when the employer service representative has established that a relationship exist with the subject employer and a neighbor employer we've been trying to get to work with and will ask to be referred to that neighbor. Three is when the employer service representative will ask the subject employer if it's OK to use them as a referral to another client or to the media for testimonials about a TDM component or their transportation program in general.
Popular Programs	<ul style="list-style-type: none"> ▪ Commuter Choice – Federal commuter tax legislation that allows employers to benefit from lower payroll taxes and allows employees a reduction in annual income. Vendors include: Commuter Check and WageWorks. ▪ Green House Gas Reduction tools and measurement reporting. ▪ Shuttles – typically 21 to 45 passenger vehicles used for last mile trips from transit hubs to employer worksites. This service is either fully or partially contracted out. A list of Shuttle providers is found on the R-drive under employer services.
Regional Events	<ul style="list-style-type: none"> ▪ Bike to Work Day ▪ California Rideshare Week ▪ Earth Day <p>Information is presented as it is made available to 511 Rideshare staff from the sponsoring organization</p>

Templates for Employer Contact/Consultations

The following information is met to provide a framework of the kind of preparation for employer consultations:

Preparation	<p>Research employer to understand industry type, their competition, and potential transportation options.</p> <ul style="list-style-type: none"> ▪ Conduct a site analysis – company's geographic location and size, proximity to
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	<p>other worksites and transportation facilities, parking availability-number of spaces and cost, transit access, rideshare drop off and pick-up locations, pedestrian access, bicycle facilities and locate any traffic mitigation measures in place.</p> <ul style="list-style-type: none"> ▪ Review and select appropriate TDM strategies based on research findings. ▪ Check Google, and employer websites. <p>This information is kept in the contact logs of the employer data base. The traffic mitigation measures are also mentioned in the ESR Territory Plans.</p>
Consultation	<p>Employer Service Representatives have a select set of questions [based on research findings] that are asked of each employer for all consultations. Typically, the initial consultation is done in person. There could be times when they are done over the phone or via e-mail based on the needs and urgency of the employer or technical capabilities of the employer. It is very common for a follow-up consultation to be done via phone or e-mail. The following questions are typically a part of meeting preparation or during the consultation.</p> <ul style="list-style-type: none"> • How can we help you be successful? • What do you see as an issue or obstacle for your success? • Can you tell me about your program as it exists today? • What would you like to see happen with your program? • Who are the decision makers here? • Can you tell me about any internal or external political issues that may affect your program? • What companies do you consider your competition? • Do you have any other locations in California; any outside of California? • How much do you know about our services? • Help me understand.... • Do I understand correctly when you say....? <p>Recommendation(s) and closing statements include</p>

	<ul style="list-style-type: none"> • Repeat answers that will create opportunities and make recommendations for success • Repeat answers that indicate issues needing to be addressed and offer solutions • Based on our discussion the next steps are...correct? • Can we agree the next steps are...?
Follow-Up/Follow-Through	<p>After a consultation a thank you for your time note or call takes place within 48 hours. The employer data base is updated and any request of the employer that could not be fulfilled during the meeting takes place.</p> <p>Review and confirm appropriate strategies based on the goals of the client and demonstrate how the goals via tracking methods will be met with the client.</p> <p>Schedule implementation timelines, tracking methods</p>
TDM Plan-A Working Document	<p>Introduction--Identify the purpose and/or goal of the plan. It should define the type of transportation improvements the plan and program will achieve. Is it to:</p> <ul style="list-style-type: none"> • Reduce vehicles, parking demand, number of drive alone commuters, • Improve employee morale, attendance, recruitment & retention, employer incentive package, corporate image. • Define the objects of the plan. • Includes the implementing details, techniques and determines the measurable process to achieve the overall goal. • Include survey process, results and recommendations <p>Transportation Assessment</p> <ul style="list-style-type: none"> • Review historical data relevant to the existing transportation program, employee participation, and general characteristics of the worksite. • Identify appropriate TDM strategies • Review managements goal for the program • Conduct a site analysis – company’s geographic location and size, proximity to other worksites and transportation

	<p>facilities, parking availability-number of spaces and cost, transit access, rideshare drop off and pick-up locations, pedestrian access, bicycle facilities.</p> <p>On-line Survey(attitudinal)</p> <ul style="list-style-type: none"> • These surveys will help identify success of a commute program by identifying appropriate modes/strategies for a targeted employee group. • Offer one of the On-Line employer surveys based on client needs. • Offer a density map to plot and identify groups of employees <p>Strategy Selection</p> <ul style="list-style-type: none"> • Review and select appropriate strategies based on the goals of the client and the results of the on-line survey and density map. <ul style="list-style-type: none"> ○ Commuter Choice ○ Carpools/Vanpools ○ Transit ○ Guaranteed/Emergency Ride Home ○ Bicycling and Walking ○ Alternate Work Arrangements ○ Emergency Preparedness-Commuting ○ Parking Management ○ Regional Incentives ○ New Hire Orientation ○ Others that may become referrals to partner agencies <p>Implementation</p> <ul style="list-style-type: none"> • Create a timeline that identifies task(s), lead person-ETC or others within the company. <p>Tracking</p> <ul style="list-style-type: none"> • Discuss tracking methods; excel spread sheets, various data base soft ware. <p>Conclusion</p> <ul style="list-style-type: none"> • Review and document how the program will meet the goals and objectives.
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Employer Case Studies

Employer Case studies provide valuable information to employers and are designed to showcase employee transportation programs for employers and to work one-on-one with ESR's and 511 Rideshare sub-contractors to develop and implement a state-of-the-art commute programs. These programs could include but not be limited to; carpool matching, vanpool subsidies, preferential parking, pre-tax benefits, compressed work weeks, telework, and more.

The program includes employers from the public and private sector of various employment sizes, and geographic locations. Two very important selection criteria include the level of commitment to the program and how ready the organization is for implementation or expansion. Employers must be willing to and allow employees to participate in the designed program for at least six months. Upon completion of the six month program, the ESRs along with 511 sub-contractors will develop a case study highlighting the programs results and impacts from both the employer and employee perspectives. In addition, ESR's and sub-contractors will assess the program's effects on air quality, energy consumption, and transportation.

Data Base Management

The employer services database is FileMaker Pro program. This database is the outreach tool that catalogs information about client data, client contacts, events and tracking of program components. The database has multiple uses by many within the organization and our clients. Therefore it is critical that the data is current and accurately reflect communication between the employer and the ESR. These records should be the first thing confirmed during any conversation with the employer. The maintenance of the database takes approximately 35% of the ESR's time and that varies based on demand of employer.

The employer services database contains four areas;

- employer information – basic information about the employer (Attachment B);
- contact log – records all activity with the employer, including events/fairs and any last contact discussions or updates with the employer (Attachment C); and
- program components – a page that identifies employer incentives offered at their worksite (Attachment D).

Protocols for 511 RRP Employer Database

- Changes of status to employers in the Employer Data Base follow the definitions described in the 511 RRP Scope of Work for inactive, active and maintenance. All employers who have not been contacted within the last two years will be considered inactive. This is a monthly rolling date; an employers' status is verified each month. The Employer Services (ESR) Database Stats report (Attachment G) is generated from the database to reflect this activity.
- The inactive employer files are to serve as a mining data base to convert clients from being without activity to an activity by definition of active or maintenance employer status.
- Active and maintenance employers are those who meet the definitions set in Attachment A-1 Glossary of RRP Terms.

There will be times when best judgment will tilt the scale of active/maintenance/inactive status, based on program maturity, viable results, and employer commitment.

Vendor and delegated county coordination

Employer services representatives work closely with VPSI, Enterprise Vanpool, ZipCar, City Carshare, The Peninsula Traffic Congestion Relief Alliance, Spare The Air, several event planners, TDM consultants, and bicycle coalitions. Some representatives may have more contact than others

based on the demand and activity of their territories. General activity includes employer meetings, employer events and collaboration when going in as a team at the invitation of an employer.

Staff Management

Approximately fifty-five to sixty percent of the Employer Services Manager's time is spent managing four employer services representatives. These areas include:

- Coaching
- Strategic collaboration and direction
- Employer Services (ESR) Database Stats
- Territory highlights
- Monthly Reports
- Monthly goals – these vary year to year based on contract requirements.

The employer services representatives are required to complete a monthly report that reflects the above mentioned information (Attachment E). They are also required to develop a territory plan and update it quarterly.

Attachment A
Employer Services Representative
Job Description

REQUIREMENTS:

Bachelor's degree in business/marketing or related field, or equivalent work experience, experience in customer service, outside sales, consulting, or professional services, strong decision-making and workload management skills, ability to exercise prudent independent judgment, excellent communication including strong public speaking, proficiency in the Microsoft suite of software, comprehensive knowledge of the San Francisco Bay Area and its transportation system. Possession of a valid CA Driver's License and personal vehicle for work-related use, reimbursed.

JOB SUMMARY:

The primary role of the Employer Services Representative is to consult with Bay Area employers of all sizes and industries for the purposes of creating tailored incentives and customized marketing of alternative modes of transportation to encourage employees' increasing commuter participation in carpooling, vanpooling, transit and bicycle commuting. The Employer Services Representative accomplishes this through consulting with local businesses, developing site-specific employee transportation program plans, developing and executing presentations to key personnel, educating area commuters, and the development of marketing incentives.

MAJOR DUTIES:

- Identify, serve and recruit employers within a specific territory
- Employ professional services consulting (may be referred to as "sales") techniques to gain entry into area employers in his/her territory and help address issues, problems, or concerns of those employers
- Make customized presentations to employer worksite managers regarding their specific benefits of an employee transportation program
- Assess the transportation needs of area businesses and recruit their participation in employee transportation programs in order to gain employee participation in alternative commute modes.
- Personalize and conduct employee commute surveys to determine employee commute patterns and interest in ridesharing and public transportation. Capture and report the data, making customized recommendations for each employer.
- Motivate area businesses to cooperate and participate in implementation of alternative modes of transportation
- Secure employer support for the establishment and training of an Employee Transportation Coordinator (ETC) in each participating work site
- Educate participating employers' staff on implementation of appropriate commuter tax benefit programs
- Assist the participating employer in establishing incentives to increase employee participation at their work site
- Maintain an ongoing relationship with each ETC to assure continued and increased participation
- Conduct marketing events and promotions, as needed, at area businesses to increase awareness and participation in alternative modes of transportation
- Develop new marketing tools addressing site specific issues to increase awareness and ridesharing at work sites with established programs
- Other duties as assigned

Attachment B

FileMaker Pro - [MDB Employer Information.fp3]

File Edit Mode Select Format Script Window Help

Employee... MARKETING DATABASE v3.0 Employer Information

Close MDB Find All Find all records with this contact

Employer Record # 5780 This record is a Main Contact Record

Status: Active Change Date: Commitment Level: Change Date: Contact Type: Human Resources RRP Contact: Linda Pumas

Company Contact: Mr. June Doe Title: ETC Company: ABCDEF Company Mailing Address: 1111 Alta Street City, State, Zip: Oakland CA 94607 County: Alameda

Site Name: Headquarters Location: (if different from mailing address) Phone: (510) 123-4567 Fax: (510) 123-9999 Primary Email Address: June.doe@abcdefco.com Web Site Address: abcdefco.com

First Contact: Last Contact: days ago: # of Employees: 300 As of: 300

Last Mailing: days ago: Mail: Secondary No Mail Employee: Bike

Related Companies: Organization Type: Employer Industry Type: Construction / Engineering

Comments: This is a sample record for inclusion as a screenshot in the SOP, 7/24/07 DKM

CONTRACT REQUIREMENTS (Record in contract log)

Event: Request Advice Request Program Info Distribute Program Info Create Identity ETC Other Program Activity New TIEE Events

Last Event: days ago: From CL Last Event: days ago: From Event

DO NOT CONTACT if this box is marked: All Contact must be through record number:

Alternate Contact:

Record Marked for Deletion

This record was Created: Last Modified: 7/24/2007 12:20:45 PM by User: Debbie Mans

100% Browse

start 100% 1:55 PM

Attachment C

Contact Log

- Enter any contract requests here; for example client asked for information about how to form a vanpool or emergency ride home program – see 511 RRP Scope of Work for other examples
- Use this as a diary or log to track follow up discussions, any special interest, and track materials mailed requests.

MARKETING DATABASE New! v3.0

Contact Log

SP

Employer Information

Employer Record #

Status

Company

Company Contact

Title

Mailing Address

City, State, Zip

RRP Contact

Phone

Fax

Primary Email Address

Location (if different from mailing address)

County

of Emp.

Contact Log Data Entry

Contact Date	Spoke With	In/Out	Method of Contact	Service	Staff

CONTRACT REQUIREMENTS
(Click Here)
Event ☐
Request Advice ☐
Request Program Info ☐
Distribute Program Info ☐
Create/Identify ETC ☐
Other Program Activity ☐
New TDM Benefit ☐

Follow up on: Last Mailing:

Material Type	Quan.	Dist.	Date

Consultation Results Type

EVENT SCHEDULING

Event Date	Time	Staffed by
<input type="text"/>	<input type="text"/>	<input type="text"/>
Event Type: <input type="text"/>		
Event Contact: <input type="text"/>		
Event Site: <input type="text"/>		
Event City: <input type="text"/>		

EVENT RESULTS

MLRs <input type="text"/>	VDLs <input type="text"/>	Promo Entries <input type="text"/>
RRP Giveaways <input type="text"/>		Employee Incentives <input type="text"/>

TDM Commitment Level
Level: Change Date:

Contact Log Comments

This record was Created:

by User:

Last Modified:

by User:

Attachment D

Program Components

- This page is used to track what ridesharing benefits companies offer their employees.
- It is also used to find ETC's with a particular program component for use as referrals to companies trying to institute a similar program.
- This page should be reviewed on each client call and taken along to update for client consultations.

MARKETING ^{New!} DATABASE v3.0		Program Components	
Employer Information		Employer Record #	
Company		Status	
Company Contact		TDM Commitment Level	Level: <input type="text"/>
Title		Phone	
Mailing Address		Fax	
City, State, Zip		Primary Email Address	
Location (if different from mailing address)		County	
Geocode		# of Emp.	
Organization Type			
Date Last Surveyed:		Referral:	<input type="checkbox"/>
		New PC Record	
Employee Transportation Coordinator (ETC) for this site: <input type="radio"/> yes <input type="radio"/> no ETC duties are: <input type="radio"/> Full time <input type="radio"/> Part time			
Program tracking: <input type="radio"/> yes <input type="radio"/> no <input type="checkbox"/> annual report <input type="checkbox"/> transportation plan <input type="checkbox"/> surveys <input type="checkbox"/> Other...			
Languages (in addition to English): <input type="checkbox"/> Vietnamese <input type="checkbox"/> Mandarin <input type="checkbox"/> Tagalog <input type="checkbox"/> Spanish <input type="checkbox"/> Cantonese <input type="checkbox"/> Other			
Commute Information dissemination: <input type="radio"/> yes <input type="radio"/> no <input type="checkbox"/> bulletin board <input type="checkbox"/> info center <input type="checkbox"/> new hire packets <input type="checkbox"/> e-mail <input type="checkbox"/> newsletter <input type="checkbox"/> intranet <input type="checkbox"/> flyer <input type="checkbox"/> voicemail <input type="checkbox"/> Other...			
Carpool/vanpool ridematching: <input type="radio"/> yes <input type="radio"/> no <input type="checkbox"/> Link to 511 Rideshare Website <input type="checkbox"/> file card (manual) <input type="checkbox"/> Fax-a-Match <input type="checkbox"/> bulletin board <input type="checkbox"/> Employer exclusive ridematching <input type="checkbox"/> zip code map <input type="checkbox"/> in-house ridematching <input type="checkbox"/> Other...			
Guaranteed Ride Home program: <input type="radio"/> yes <input type="radio"/> no <input type="radio"/> operated by employer: <input type="checkbox"/> formal <input type="checkbox"/> informal <input type="radio"/> operated by other than employer (e.g. city, county) Employer-operated program uses: <input type="checkbox"/> company cars <input type="checkbox"/> taxi service <input type="checkbox"/> rental agency <input type="checkbox"/> co-workers <input type="checkbox"/> Other...			
Support facilities: <input type="radio"/> yes <input type="radio"/> no <input type="checkbox"/> atm <input type="checkbox"/> dry cleaner <input type="checkbox"/> store <input type="checkbox"/> child care <input type="checkbox"/> showers <input type="checkbox"/> gym/rec. facil. <input type="checkbox"/> cafeteria <input type="checkbox"/> electric vehicle charging stations <input type="checkbox"/> lunch room <input type="checkbox"/> Other...			
Member of TMA?: <input type="radio"/> yes <input type="radio"/> no <input type="radio"/> Bishop Ranch <input type="radio"/> Moffett Park BTA <input type="radio"/> Best Work Place <input type="radio"/> Hacienda Bus. Park <input type="radio"/> SVLG <input type="radio"/> Other... <input type="radio"/> TMA of San Francisco <input type="radio"/> SSV <input type="radio"/> West Berkeley Gateway <input type="radio"/> Altrans			
Parking: <input type="checkbox"/> free <input type="checkbox"/> Off-Site <input type="checkbox"/> Bundled <input type="checkbox"/> Subsidized <input type="radio"/> equal number of cars and spaces <input type="checkbox"/> Cash Out <input type="radio"/> more cars than spaces <input type="checkbox"/> Qualified Parking <input type="radio"/> more spaces than cars <input type="checkbox"/> designated carpool parking <input type="checkbox"/> designated vanpool parking <input type="checkbox"/> Other... # of designated spaces? _____			
Commuter Tax Benefits: <input type="radio"/> yes <input type="radio"/> no <input type="checkbox"/> Benefit <input type="checkbox"/> Pre-tax <input type="checkbox"/> RTC <input type="checkbox"/> Eco Pass <input type="checkbox"/> Other <input type="checkbox"/> Commuter Check <input type="checkbox"/> Wage works			
Financial incentives: <input type="radio"/> yes <input type="radio"/> no <input type="checkbox"/> Free/discounted gas <input type="checkbox"/> subsidized transit tickets <input type="checkbox"/> Earned time off <input type="checkbox"/> subsidized vanpools <input type="checkbox"/> Drawings/prizes <input type="checkbox"/> Other...			
Transit Services Nearby: <input type="radio"/> yes <input type="radio"/> no <input type="checkbox"/> bus <input type="checkbox"/> stops at site <input type="checkbox"/> stops within 1/4 mile <input type="checkbox"/> rail <input type="checkbox"/> stops at site <input type="checkbox"/> stops within 1/4 mile <input type="checkbox"/> ferry <input type="checkbox"/> stops at site <input type="checkbox"/> stops within 1/4 mile			
Shuttle: <input type="radio"/> yes <input type="radio"/> no <input type="checkbox"/> open to non-employees <input type="checkbox"/> to/from transit or parking <input type="checkbox"/> between company sites <input type="checkbox"/> Long Distance Shuttle <input type="checkbox"/> BART <input type="checkbox"/> Caltrain <input type="checkbox"/> light rail <input type="checkbox"/> parking lot <input type="checkbox"/> ACE Frequency: <input type="radio"/> all day <input type="radio"/> peak periods <input type="radio"/> Other... Funded <input type="checkbox"/> city <input type="checkbox"/> office complex <input type="checkbox"/> employer co-op by <input type="checkbox"/> employer <input type="checkbox"/> transit agency <input type="checkbox"/> Other...			
Bike program: <input type="radio"/> yes <input type="radio"/> no <input type="checkbox"/> financial incentives for bicyclists <input type="checkbox"/> facilities (showers, lockers, racks, inside parking) <input type="checkbox"/> general support (info available, etc.) <input type="checkbox"/> bike mentors <input type="checkbox"/> Other... Total number of bikes accommodated (in lockers and racks): _____			
Vanpool program: <input type="radio"/> yes <input type="radio"/> no <input type="checkbox"/> owns or leases vans for employees' use <input type="checkbox"/> provides ongoing financial support to vanpools <input type="checkbox"/> encourages vanpool use (may include short term \$ support)			
Alternative work hours: <input type="radio"/> yes <input type="radio"/> no <input type="checkbox"/> compressed work week (e.g. 4/40, 9/80) <input type="checkbox"/> shift work <input type="checkbox"/> staggered work hours <input type="checkbox"/> Other... <input type="checkbox"/> flextime			
Telework: <input type="radio"/> yes <input type="radio"/> no <input type="checkbox"/> formal program <input type="checkbox"/> at home <input type="checkbox"/> Other... <input type="checkbox"/> informally allowed <input type="checkbox"/> at satellite office			

Attachment E

Regional Rideshare Program
Monthly Status Report – [Insert Month and Year Reporting]

Revised 1/2008-LT

•-----•
Employer Services Representative:

Territory:

Date: [Insert date report prepared]
•-----•

Accomplishments/Results

New employers in the database [Insert Total]

List Company Name(s)

Territory Highlights

of events & MLRs

List Company Name(s) and total MLR(s)

Onsite Events: [Insert Total]

List Company Name and total MLR(s)

Online Commuter Event: [Insert Total]

List Company Name and total MLR(s)

Surveys – [Insert Total]

List Company Name and total MLR (s)

Vanpools formed

List Company Name(s)

Consultations – [Grand Total of All Below]

Email Consultations [Insert totals]

List Company Name(s)

Phone Consultations[Insert total]

List Company Name(s)

In-person Consultations [insert total]

List Company Name(s)

New TDM Benefits

List Company Name(s), total employees and new benefit i.e.; GRH, Telework, Commuter Choice

New Links to 511

List Company Name(s)

ELC Updates

[Insert any change/progress or no update]

New and stronger relationships developed

Future Goals

Attachment F

Discussion Goals: review areas below to ensure mutual expectations and understanding of performance goals and functions are achieved.

Purpose: to provide documentation, consistency and accountability within the team for both the ESR and manager. The ESR will receive a copy via e-mail of what's documented and provide any feedback or corrections, if any or no comments are received it will be considered correct and understood. It will also serve as a means to identify the ESR for "Way To Go" nominations and information to be used as a reference for performance appraisals/development conferences.

Date	Monthly Report	Individual Contract Goals	Data Base Management	Next
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Monthly Report – review report and discuss any vague statements or get clarity under the following sections:

- accomplishments/results
- territory highlights
- new and stronger relationships developed or in development
- future goals
- Employer Leadership Challenge

Individual contract goals – review of data base stat sheet and compare timesheet hours per task to balance time and see other areas that should be noted and acknowledged for work done outside of the contract goals.

Database Management – review data base to ensure files are current and have all fields completed to ensure at any time a report is ran or requested data is complete or has an explanation of why something is missing. Focus will be given at minimum to the following reports which will be run prior to the meeting:

- files (active and maintenance) with a last contact date of 13 months or more
- files with missing # of employees at site
- Active files with no levels assigned
- Active files with no contract requirements logged
- Active files with contract requirements

Attention will be paid to the following required fields for each file:

Employer Information Page:

- Contact Information including e-mail addresses(unless otherwise noted)
- Status w/change date
- Commitment Level w/change date
- RRP Contact
- First/last contact
- # of employees at site
- Contract Requirements to match commitment level and status

Contact Log Page:

- Contact information
- Status
- RRP contact

- Contract requirements – if new tdm benefit or other program activity selected...that benefit or activity should be identified under “consultation results type.”
- Follow-up date
- Events Scheduling – if an event is scheduled
- Events Results – Employer Services Manager will enter event results from those staffed by Michael Satchell.
- Contact log comments

Program Component Page:

- Review program elements/incentives/strategies that make up level assignments.

Next

- Discuss any goals for upcoming month, i.e., employer meetings, follow-up, research, and/or needs from manager(s)

Monthly Meeting Review ESR's

Attachment G

County	ACTIVE			Levels			MAINTENANCE			NEW					Additional Performance Data				
	Active	Change to Active	TOTAL ACTIVE	1	2	3	Maintenance	Change to Maintenance	TOTAL MAINTENANCE	Change to Active	Change to Maintenance	Active	Maintenance	"NEW" TOTAL	New TDM Benefit	# of Empl	New Link to 511 ELC	# of events	# MLRS
LM/ALA																			
MS/ALA																			
Marin																			
San Francisco																			
LF/Santa Clara																			
MS/Santa Clara																			
Sonoma																			
TOTAL																			

Active: Active flag
 Change to Active: Change to Active flag
 Maintenance: Maintenance flag
 Change to Maintenance: Change to Maintenance flag

 New:
 Change to Active: Change to Active flag + Status Change Date
 Change to Maintenance: Change to Maintenance flag + Status Change Date
 Active: Active flag + Create Date
 Maintenance: Maintenance flag + Create Date

 Create date:
 Status Change Date:

